

Agent Authorization Tips & Resources

Key dates (2026)

- October 12 to 13: Agent authorization goes live on HealthSherpa.
- October 13: [Agent authorization training](#)
- October 13: CMS sunsets 3-way calls/invalid action

Tips from agencies already live

- Check phone and email before you send. Requests go to the contact info on the application.
- Don't create a new or duplicate app to get around bad contact info. CMS will flag/cancel duplicates.
- Give clients a heads up. The text or email comes from HealthSherpa, not your number. Client communication help/info can be [found here](#).
- Links expire after 15 minutes. Clients can click Get new link for a new one.
- You get 3 sends per client in a rolling 24 hours. 3 per email/3 per text.
- Sending while you're on the phone with the client works best. Bulk sends work better after a heads up.
- If ID verification fails, have the client try another ID, another device, or another verification option before calling the Marketplace.
- We're already working on things like VOIP phones, updating contact information, etc. You will likely see a lot of changes and quick iterations over the next few weeks. Please report issues to agent support, or escalate through me. Let's keep the feedback loop open!

Resources

- Agent authorization [FAQ](#)
- [ID verification help](#)
- [CMS FAQ](#)

Need help?

- HealthSherpa Agent Support: [\(888\) 684-1373](#)
- Email: Support@HealthSherpa.com
- Chat: inside your HealthSherpa account
- Marketplace Agent and Broker Line: [1-855-788-6275](#) (complex cases only)